

**Phoenix Program
Process Definition – HRMS-PAY**

Process	<i>Maintain Employee Tax Information</i>
Process Number	<i>Pay 0109 Revised 4/11/01</i>

Description of Process

This processis used to enter or make changes to employee tax information

Input to Process

Federal W-4 Form, Federal W-5 Form and/or State G-4 Tax Form

Output of Process

Information entered, saved, and can be retrieved and reviewed for accuracy. Taxes are calculated properly on paycheck based on tax status entered.

Service Level Agreement Required? (if yes, provide a brief description)

No

PeopleSoft Panel Groups being Used

Function	Panel Group
Compensate Employees – Maintain Payroll Data U.S.-Use	Employee Tax Data

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Business Process Description

Process Description	Responsibility (Company/Centralized)
Step 1 Navigation: Go, Compensate Employees, Maintain Payroll Data U.S., Use, Employee Tax Data, Federal Tax Data 1, Update/Display.	Company
Step 2 Enter Employee ID, SS#, or use Name search and select employee record from list.	Company
Step 3 Federal Tax Data 1 appears insert a row and enter effective date of W-4 change, enter new data in appropriate fields (Marital Status, Tax Status, Allowances or Exemptions etc). Tab to Federal Tax Data 2 and verify that the Exempt for FUT checkbox is on and enter the Earned Income Credit information if form W-5 has been submitted, Tab to Federal Tax Data 3 if changes are required.	Company
Step 4 If there are changes to State Tax data, tab to State Tax Data 1 and 2 to make changes to Tax Status, Withholding Allowances, and Additional Allowances. If any employee is a resident of any state other than Georgia they will have two state tax rows on State Tax Data 1 panel, one with a Work State of Georgia, and another with a Resident State. The Resident State row must be marked Do Not Maintain Taxable Gross and Do not Withhold Tax. On the GA. row, check the UI radio button and the Special Tax Withholding Status of None, the Marital Status, Withholding Allowances or Additional Withholding Amount as stated on G-4 Form.	Company
Step 5 Certain employees are exempt from State Unemployment coverage (check status with your Agency's Legal Department), to claim exempt go to State Tax Data 2 panel and Click on the Exempt from SUT checkbox. Save.	Company
Step 6 Note: If during the hire process by HR there were errors in the state tax data fields the paysheet may be created with incorrect state tax data. If you receive a payroll error message during calc regarding "no state tax data record or incorrect state tax data record," check the Employee Tax Data panel and verify the effective date equals the hire date on Job Data. If there is no state or the state is incorrect change and save. If paysheets have already been created you will need to change the state record on the paysheet to the correct information. Navigation: Go, Compensate Employees, Manage Payroll Process U.S., Use, Payline with Security, Payline, enter the Employee ID and select OK. On employee's payline in the State field either enter or use the drop down to enter the correct state abbreviation and Save.	Company

Forms Used with Process (#)

**Attach sample form(s)

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Process Flow Diagram (if appropriate):

Process Signoff

Tested By
Date Tested